

Tips for Panel Introduction

FY 2016 Social Innovation Fund Pay for Success Round 2

Panel Intro Call

Introductions and Agreements

- Allow each Reviewer to give their background and level of experience with staff review
- Intros and scheduling can be done via email or phone, but phone usually cuts down on back and forth • Panel Coordinator will set up Intro call
- Establish optimal means of communication for each Reviewer (e.g., preferred email address, phone number) • Review the expectations and schedule, and set the dates and times of the Panel Discussions
- Establish who the Lead Reviewer is for each application.

I. Welcome and Introductions

Background

A. What s/he brings to review process:

1. Job experience
2. Past participation in grant reviews
3. Personal information
4. Work style

i. Review Process and Responsibilities

- a. Ensure everyone understands where they are (Orientations completed, etc)
 - i. Ensure everyone understands the tasks required during the review (Timeline)
- ii. Assign Lead Reviewers to each application to help with discussion

ii. Expectations

- a. Create agreements in preparation for a smooth review
 - i. Reminder that applications should be read in order by established Sets

iii. Correct/Gather Additional Reviewer Contact information

- a. Allows Reviewers to contact each other at most convenient numbers, or on particular days
- b. Encourage Reviewers to keep each other's information handy

II. Reminder to check for Conflict of Interest

- a. Ask Reviewers to review the applications and form I to flag any potential Conflicts of Interest early, if they have not done so already
- b. COIs may require readjusting assignments or the order in which you review applications

III. Other Miscellaneous Points and Agreements

- a. Reminder to use the samples and resources on the shared drive
- b. Share tips and helpful hints (anyone can contribute)
- c. Method of communication
 - i. Email preferred, phone as follow-up or time-sensitive?
 - ii. Reminders will/will not be sent
 - iii. How to label documents?

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iv. Dates/times for Panel calls

IV. Working with CNCS Staff Liaisons

- a. GARP Liaisons will be assisting everyone through the Review
- b. Panel Coordinator will provide feedback on the PCFs.
- c. POL/Jenni Stoff will provide guidance on interpreting the selection criteria and Notice of Funding. Panel Coordinator will communicate any questions to POL and then share answers with panel members.
- d. Reviewers should copy the GARP Liaison on emails in order to keep them apprised of progress
- e. Once any Panel Coordinator feedback is incorporated, Lead Reviewer should email final PCF to GARP Liaison.

Post-Panel Introduction Call email (Template for follow up with panel)

Hello Panel #__! Below is the information that we discussed and agreed on for this Staff Review.

Name of Reviewer:

City & Time Zone:

Notes about Contact/Schedule:

Name of Reviewer:

City & Time Zone:

Notes about Contact/Schedule:

(if there is an additional reviewer) Name of Reviewer:

City & Time Zone:

Notes about Contact/Schedule:

Order for Reviewing Applications

	Set	Legal Applicant	Panel Discussion Date	Lead Reviewer	PCF to PC by (Date)
1	A				
2	B				
3	B				
4	C				
5	C				
6	C				
7	D				

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Preparing for the Review Process

- ☐ Read Notice/Orientations
- ☐ Read applications
- ☐ Take notes/comments responding to Selection Criteria
- ☐ Submit PCF to PC after discussion
- ☐ Incorporate PC feedback

Schedule Panel Discussion Calls

Day	Date	Time	Time Zone	Application/Lead Reviewer

Panel may also wish to schedule a “Panel Closing Call” for March 9 to tie up any loose ends.